

HOW TO CREATE GROUP RESTRICTIONS - POWER USERS ONLY

This guide will show you how to add users to restrictive groups so you can specify what data they can and can't see. This helps to focus your team members on the accounts, fields and areas specific to them, and means they only see the data that's key to their job role.





03 Select the User you want to restrict, then click Edit User.

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k Search	Recently Viewed Search All	Accounts V Search.	Search Custorn	er View NSSPECIAL PRICING CAMPAG	ON FOR FRE					SELL SMA	at 🗨
A.	Company Profile	DataLoad	Parameter Setup	Manage Users Ticker	Campaign Manager		Edit Prospect Configuration	Command Post		Document Storage	MyC
MC .	Users Restrictive *	har Restrictions									
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	Edit Us	er vos k	The first of the second to								
RM	Username	Forename	Sumane	Erol	User Type	Restrictions	Last Login	0	Mode	Status	Activated
	alexfooddemo	Alex	Witcpalek	awitcpalek@sales-Lcom	POWER USER	0	Fri May 11 2018 at 9:53 am	N		ON	Activated
ß	benkgerfood	Ben	Luger	bluger@sales-i.com	POWER USER	0	Tue Sep 12 2017 at 5x46 pre	N		ON	Activated
sport	briancox	Brian	Cox	bcox@test.com	SALES	1	Fri Dec 8 2017 at 3:53 pm	N		ON	Activated
	chardenfoodtest	Chris	Barden	darden@sales-i.com	POWER USER	0	Yesterday at 1:30 pm	N		ON	Activated
8	cdelahomefoodtest	Claire	Delahorne	cdelahorne@sales-i.com	POWER USER	0	Today at 1:36 pm	N		ON	Activated
porting	cramos	Cynthia	Ramos	cynthiaramosijikrasdalefoods.com	SALES	0	Thu Jun 15 2017 at 9:42 am	N		ON	Activated
	dstarrfood	Dominic	Starr	dstarr@sales-i.com	POWER USER	0	Fri Dec 8 2017 at 3:56 pm	N		ON	Activated
2	jtowmend	Jeff	Townsend	jtownsend@sales-i.com	POWER USER	0	Fri Dec 8 2017 at 3:30 pm	N		ON	Activated
rofile	jonfooddereo	Jon	Tracey	JTracey@sales-i.com	POWER USER	0	Mon Aug 54 2017 at 9:13 am	N		ON	Activated
	aa@alpha1marketing.com	Ken	Krasne	aa@alpha1marketing.com	SALES	0	Sat Sep 23 2017 at 8:52 am	N		ON	Activated
	kingfood	Kevin	McGirl	kmgpirl@sales-Lcom	POWER USER	0	Fri Jun 1 2018 at 345 pm	N		ON	Activated
	marchbeld@normandistributio	n Matthew	Architold	MArchbold@NormanDistribution.com	SALES	0	Mon Apr 24 2017 at 4:32 pm	N		ON	Activated
	suzelac_food_test	Sarah	Uzelac	suzelac@sales-i.com	SALES	0		N		ON	Activated
	sztelarseyű2	Scott	Delaney	sdelaney@sales-i.com	POWER USER	0	Tue May 22 2018 at 12:01 pm	N		ON	Activated
	svonberckefoodtest	Susanne	Von Borcke	svenborcke@sales-i.com	POWER USER	0	Today at 11:32 am	N		ON	Activated
	example	Test	User	example@test.con	POWER USER	0		N		ON	Deactivated
											Antonia



Edit User				•			
Restriction Selector				•			
Currently Available Restrictions							
bathroom restriction	Description			Restriction Type			
bola's restriction							
Chris Samuel							
colinjackson							
CRM only							
CRM only							
CRM Only TEST-RC							
CS birmingham							
CS Branch Belfast							
Darren Franklyn							
Demo Test2010							
Demo user							
Garys area							
Gaue							
Add Restriction Cancel Cr	eate Restriction	striction					

05 Click Create Restriction.



06 Now it's time to build your restriction:

a) Name the Group Restriction (Note: We recommend naming the restriction after the Sales Rep) b) Select Customer Analysis c) Select Sales Rep d) Scroll through the list, select the sales rep code(s) this user should have access to and change the drop down from Not Set to Include.

e) Click Save to create this restriction.

Edit User								
Restriction Selector								
Currently Available Restrictions								
Lucy Jackson	*	Description	Restriction Type					
Matthew Dean		Customer Analysis > Salesren > Sarah Bourne (430)	Include					
ME		Costance randysis - building - building (100)						
Micheal Kennedy								
My stuff								
ns								
Ollie Test								
PaulW chris samuel only								
Peter williams								
rep9								
Sarah Bourne								
sj								
South F	Ŧ							
Add Restriction	Cr	eate Restriction Edit Restriction						

Restriction Builder			•
Sarah Bourne			
Customer Analysis	Branch	Sandra Turner (490)	Not Set 🛛 💌 🏝
Sales History Analysis	Delivery Route	Santamarina Morgan (860)	
Product Analysis	Market	Sarah Bourne (430)	Include 🔻
	Salesrep	Sean South (880)	
		Sue Nelson (180)	Not Set 🛛 🔻
		Tim Armstrong (390)	Not Set 🛛 🔻
		Toby Junior (800)	Not Set 🛛 🔻
		Tom Owens (320)	Not Set 🛛 🔻
		Turomsha Rosalie (840)	Not Set 🛛 🔻
		Unassigned (ZZZ)	Not Set 🛛 🔻
		Vacca Barney (810)	Not Set 🛛 🔻
2		Vila Georgette (600)	Not Set 🛛 🔻
Save			

07 Select the newly created group from the list on the left-hand side and click Add **Restriction**.

Finally, click Update.

The user you selected will now be restricted to see only the data you have allowed.